11 CHAPTER: VIEW TAXPAYER RETURN INFORMATION

11.1 Overview

Localities are local units of government such as a county or city. There are 133 localities staffed by elected or appointed officials and their employees in the Commonwealth of Virginia. Staff of these localities can view information about business taxpayers in their locality or up to 20 adjacent localities, Sales Tax and Use tax information about business taxpayers regardless of their locality, and individual taxpayers regardless of their locality.

Additionally, localities may decide to allow taxpayers to file their Virginia Individual Income tax returns in the locality where they live. Each locality elects whether they will accept locally-filed returns or if returns should be directly-filed with the Department of Taxation (TAX). Localities that elect to accept locally-filed returns perform the initial processing on the returns, then send them to TAX for final processing.

Taxpayers can file current year Individual Income and Fiduciary tax returns locally with the office of the Commissioner of the Revenue, Director of Finance, or Director of Tax Administration. These returns can be received by mail or walk-in visits to the office.

11.2 Return Information

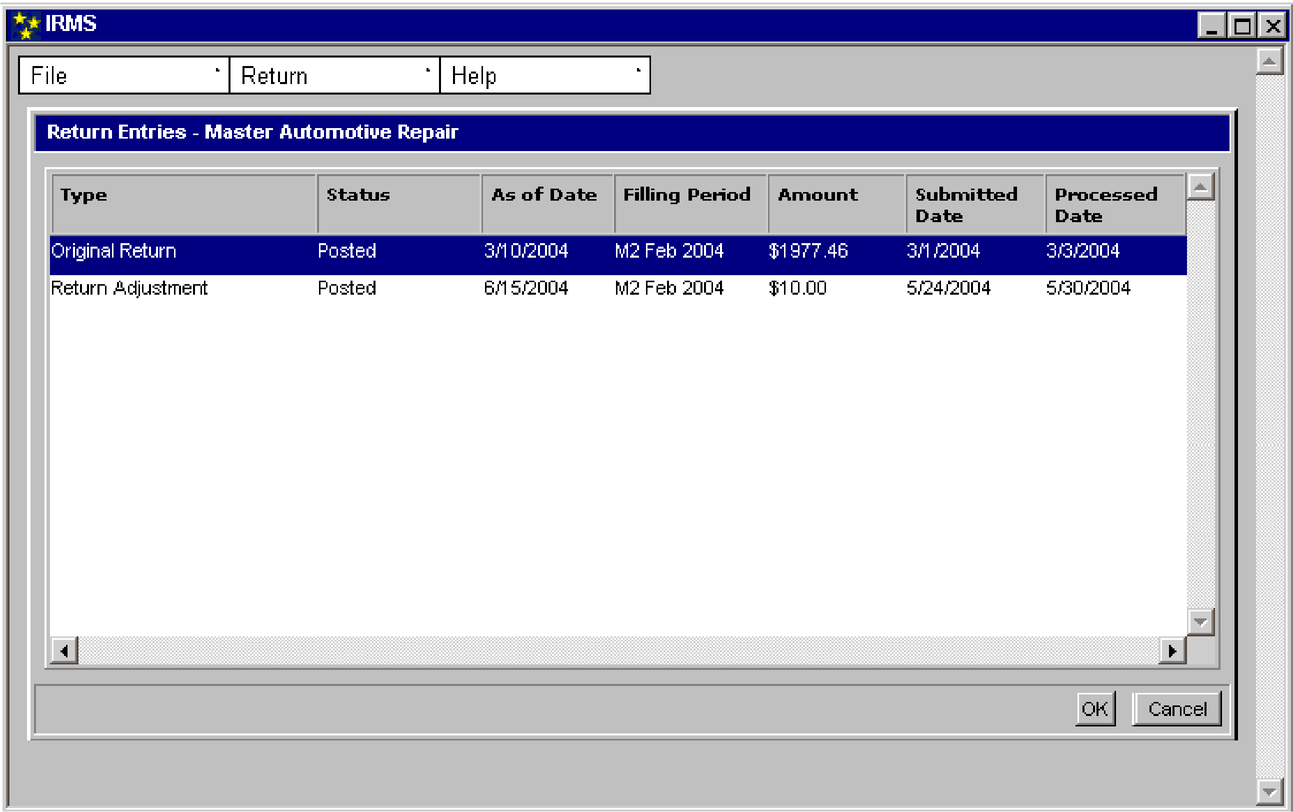
Local Commissioners of the Revenue and their staffs can access the IRMS Web application to view return information about businesses and individuals. You can view return information at the entry level or at the detail level.

11.2.1 View Return Entries

You can view taxpayer return entries (i.e., returns, adjustments) on the Return Entries window in the IRMS Web application.

Return Entries Window

The illustration below is the Return Entries window.



Return Entries Window Fields

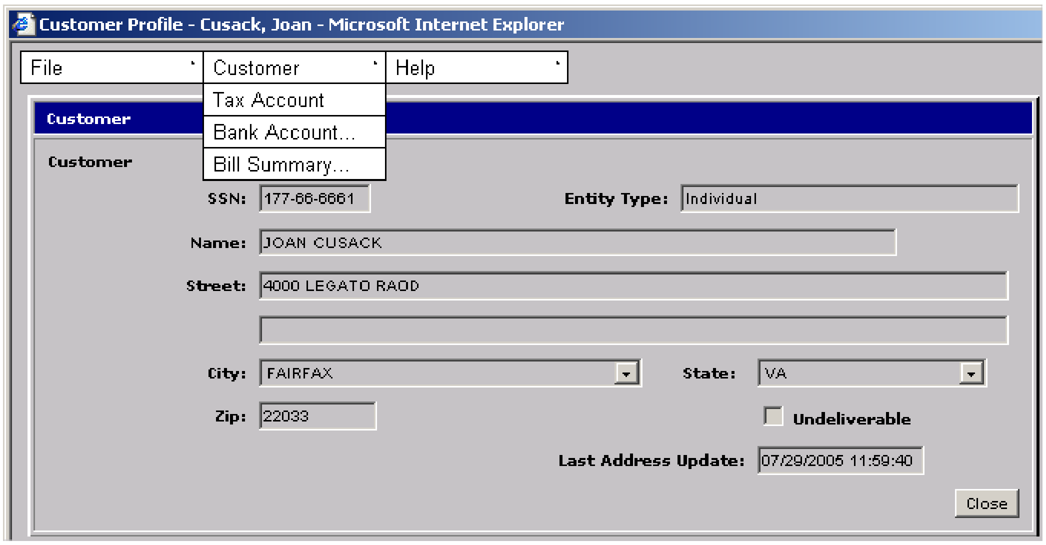
The table below lists the fields on the Return Entries window and provides a brief description of each.

Field	Field Type	Description
Type	System Generated	The type of return the customer files such as original, amended, or informational.
Status	System Generated	The current status of the return in the process (i.e. posted, pending, cancelled).
As of Date	System Generated	Date of the latest status.
Filing Period	System Generated	The period covered by a tax return. For example, an income tax return usually includes a twelve-month period, while sales or withholding tax returns generally cover a period of one calendar month or quarter.
Amount	System Generated	Amount of the tax.
Submitted Date	System Generated	Date the tax return was received.
Processed Date	System Generated	Date the tax return was processed.

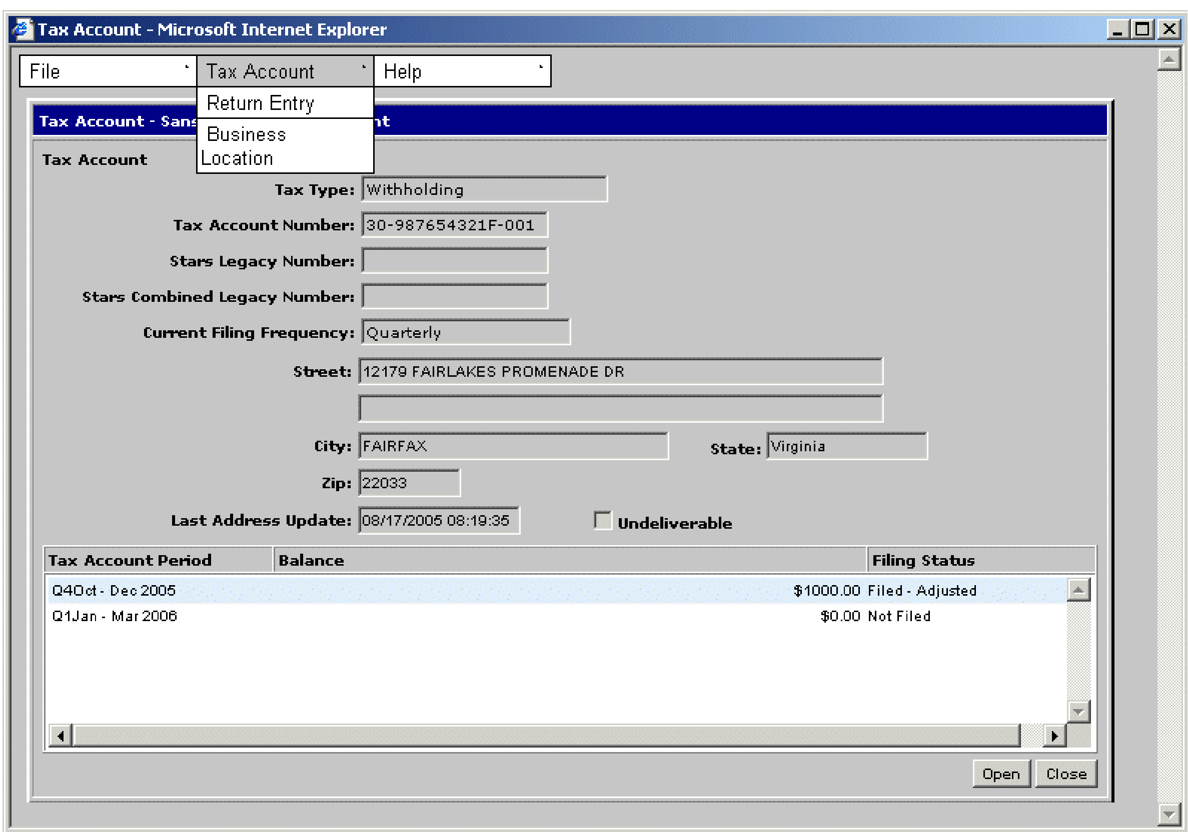
View Return Entries

Perform the following steps to view the Return Entries window:

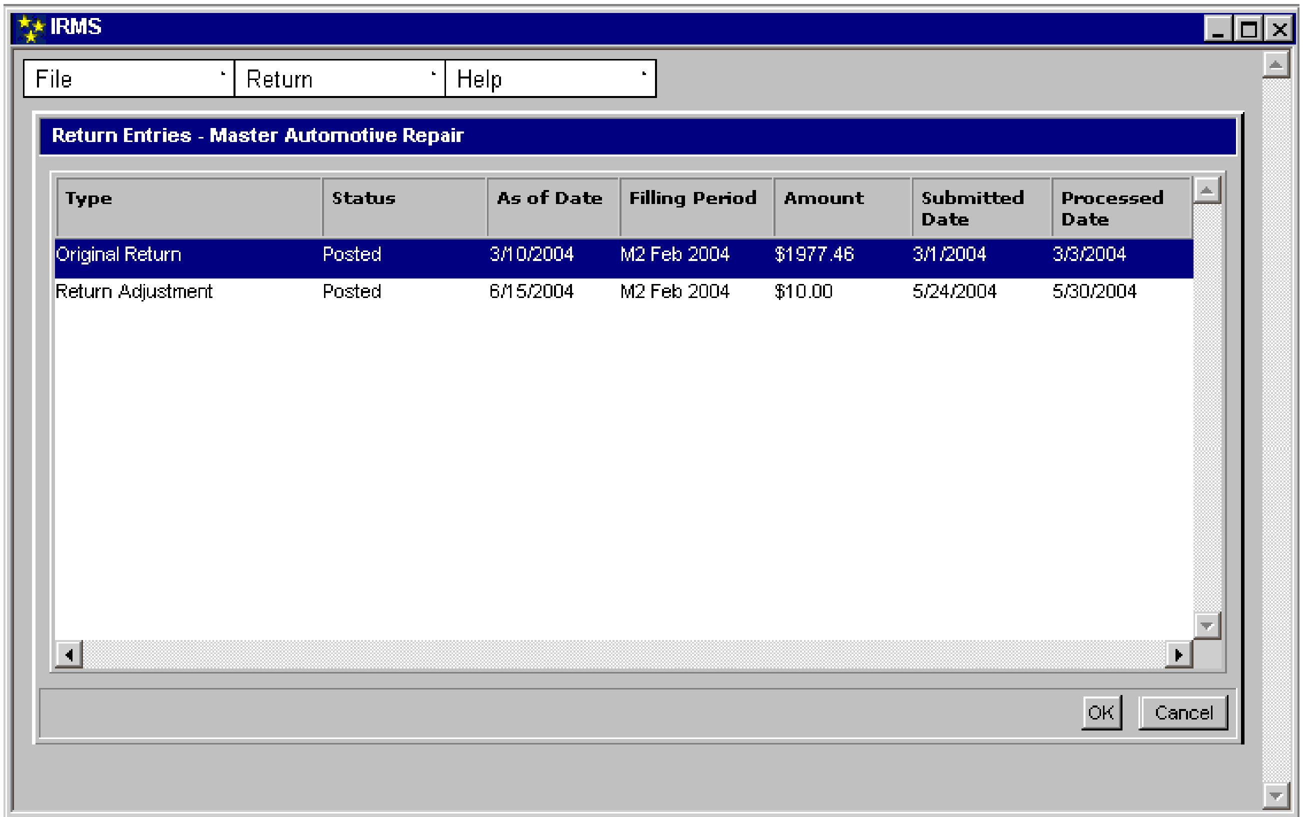
Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).



Step 2: From the Customer Profile window, select **Customer: Tax Account**. The Tax Account window opens.



Step 3: Select **<u>Tax Account: Return Entry</u>**.
The Return Entries window opens and displays the returns for the taxpayer.



Step 4: Click **Cancel** to exit the Return Entries window and return to the Tax Account window.

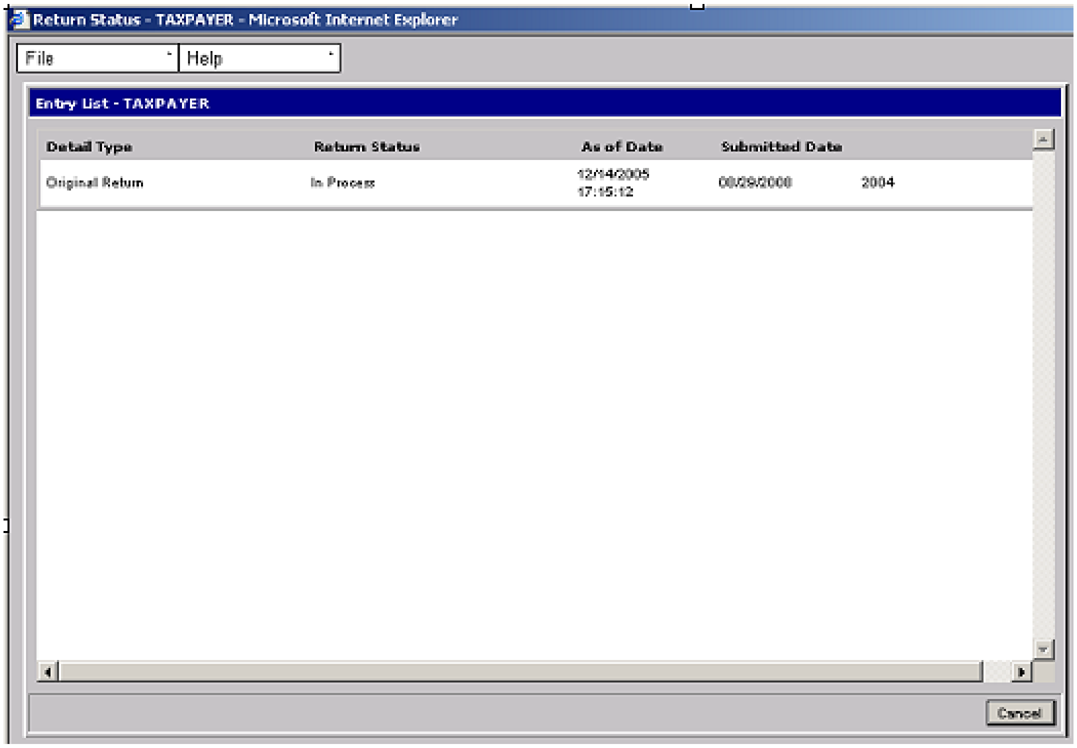
11.2.2 View Return Status

You can view the status of an individual taxpayer's return in processing, as well as the date and time this status was last updated. This information is available in the customer's Tax Account on the Entry List window.

Note: This functionality is currently limited to Commissioners of the Revenue.

Entry List Window

The illustration below is the Entry List window.



Entry List Window Fields

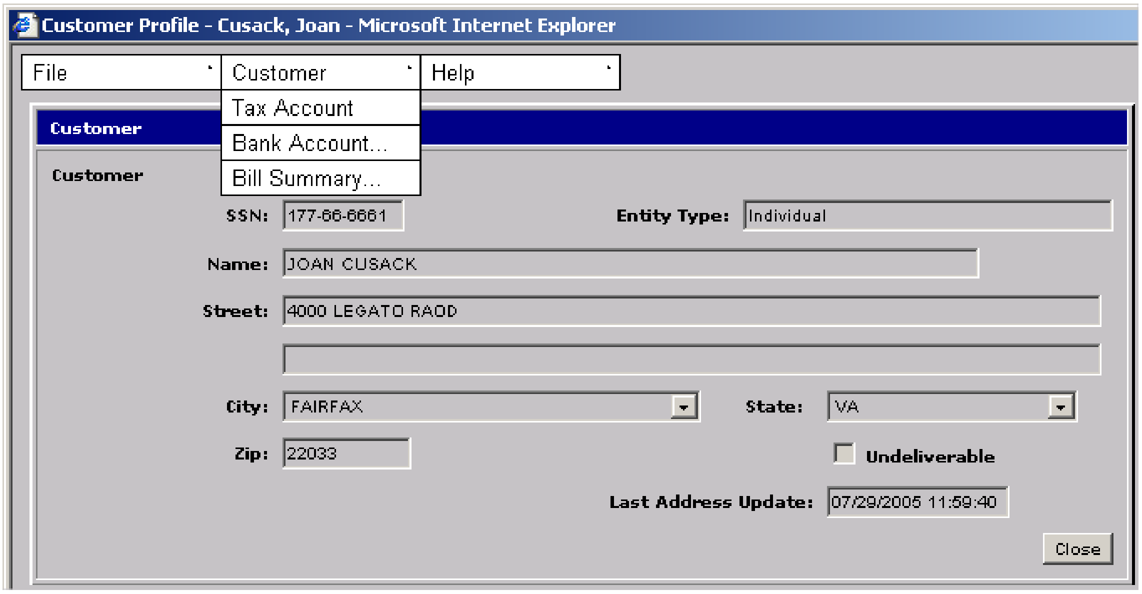
The table below lists the fields on the Entry List window and provides a brief description of each.

Field	Field Type	Description
Detail Type	System Generated	Type of return the taxpayer filed (i.e., original, amended, or informational).
Return Status	System Generated	Status of the return in processing. The available statuses are: • **In Process** – the return is being worked and has not yet posted to the customer's account • **On Setoff** – the customer's account has an external offset entry • **Posted** – the return has posted to the customer's account
As of Date	System Generated	Date and time the return status was last updated.
Submitted Date	System Generated	Date the return was submitted.

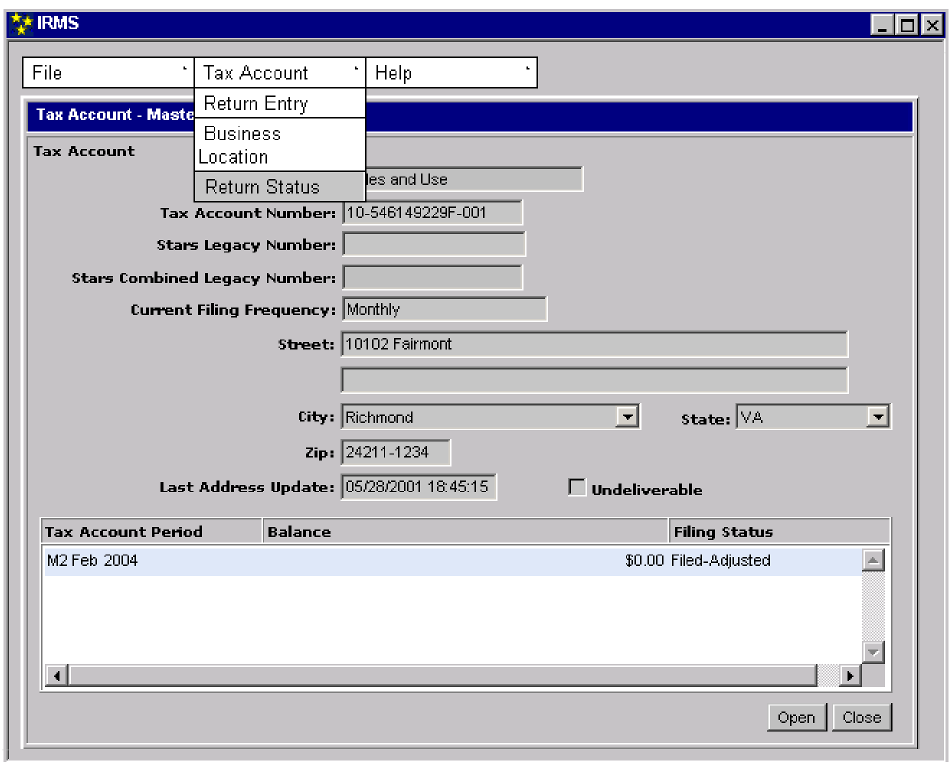
View Return Status

Perform the following steps to view the status of a return:

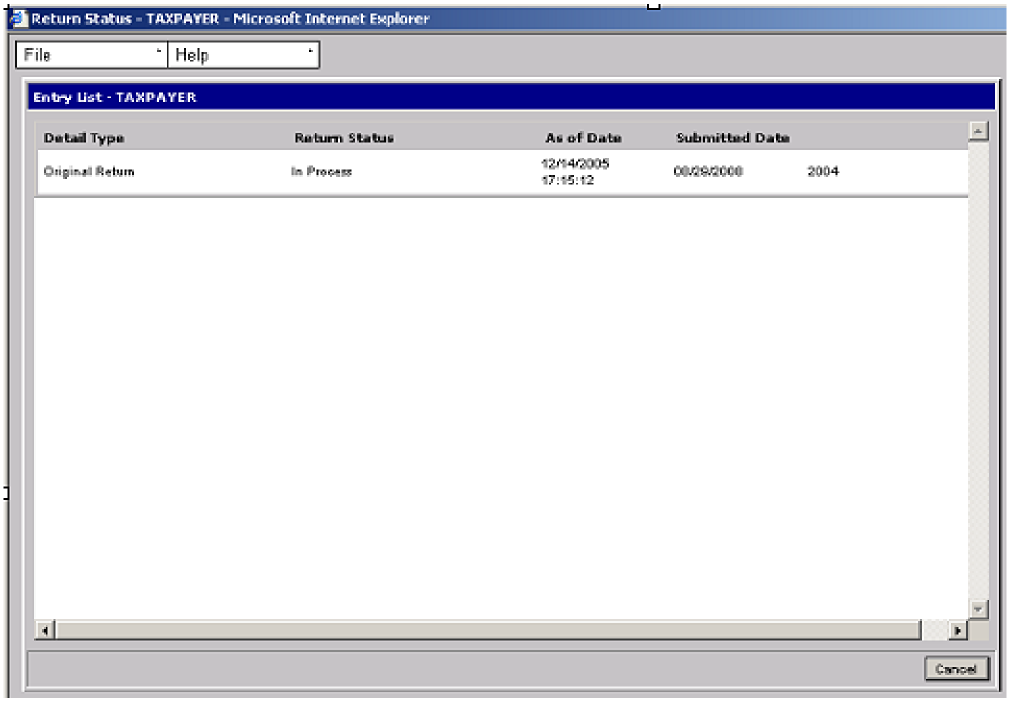
Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).



Step 2: From the Customer Profile window, select **Customer: Tax Account**.
The Tax Account window opens and displays the Tax Account Periods associated with this account.



Step 3: Select **Tax Account: Return Status**.
The Entry List window opens and displays the detailed status information for all returns posted in the customer's account.



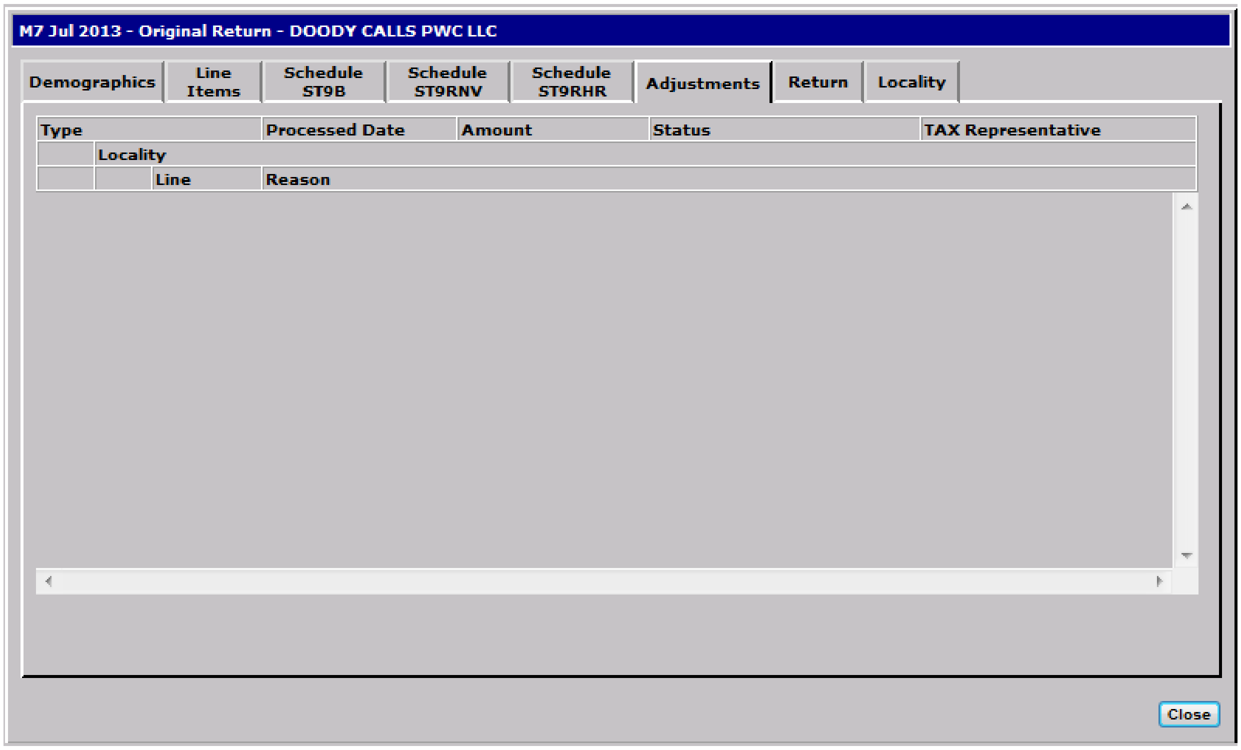
Step 4: Click **Cancel** to exit the Entry List window and return to the Tax Account window.

11.2.3 View Return Detail Information

You can view detailed information about a taxpayer's return on the Return Details window in the IRMS Web application. The Return Details window contains five tabs. The tabs and their contents will vary depending on the type of return the taxpayer files (Withholding, Sales & Use, Individual, etc.). You may also see a difference based on the year in which the return was filed, since returns can change from year to year. Therefore, it is impossible to demonstrate all the possible combinations of windows. Those displayed are representative of the windows most likely to be viewed. The information contained on all tabs is informational only and cannot be modified.

Return Details Window – Adjustments Tab

The illustration below is the Return Details window with the Adjustments tab opens.



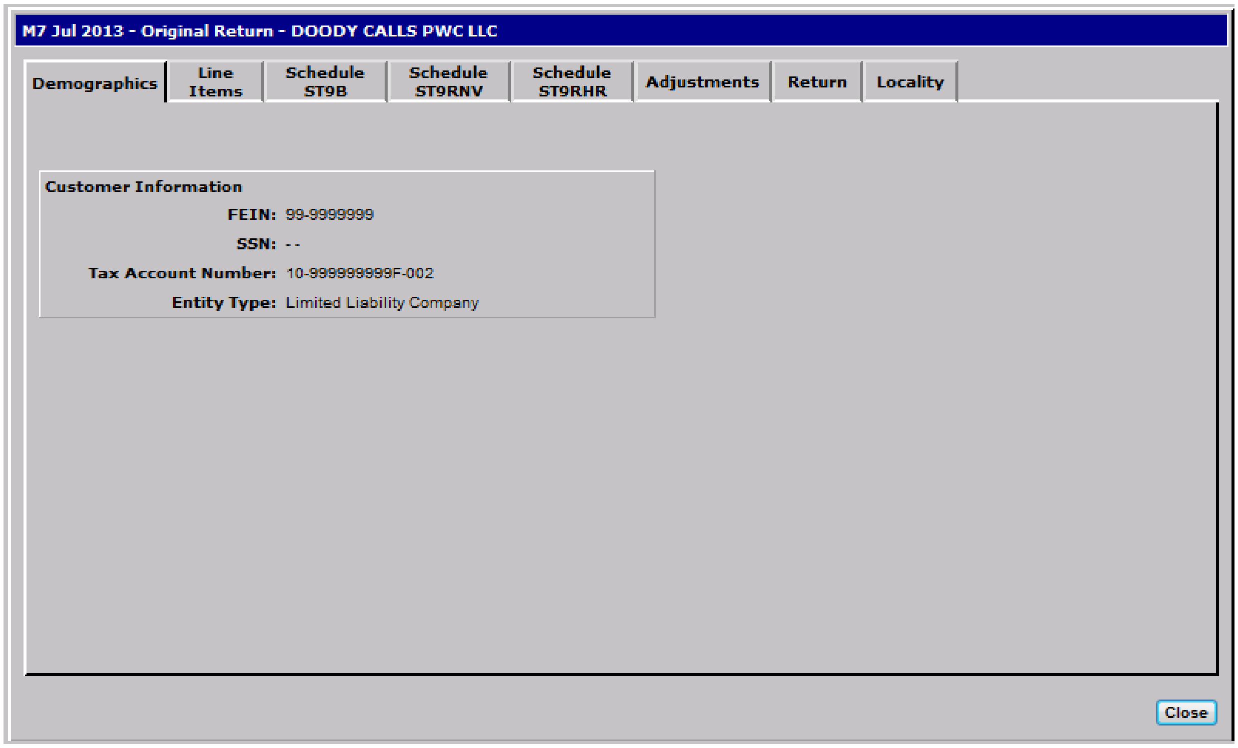
Return Details Window– Adjustments Tab Fields

The table below lists the fields on the Return Details window - Adjustments tab and provides a brief description of each.

Field	Field Type	Description
Type	System Generated	Type of Adjustment.
Processed Date	System Generated	Date the Adjustment was processed.
Amount	System Generated	Dollar amount of the Adjustment.
Status	System Generated	Status of the Adjustment.
Tax Representative	System Generated	Name of the Tax Representative who processed the Adjustment.
Locality	System Generated	Your agency.
Line	System Generated	Identifies the return line by number and title that was adjusted.
Reason	System Generated	Why the adjustment was made.

Return Details Window – Demographics Tab

The illustration below is the Return Details window with the Demographics tab open.



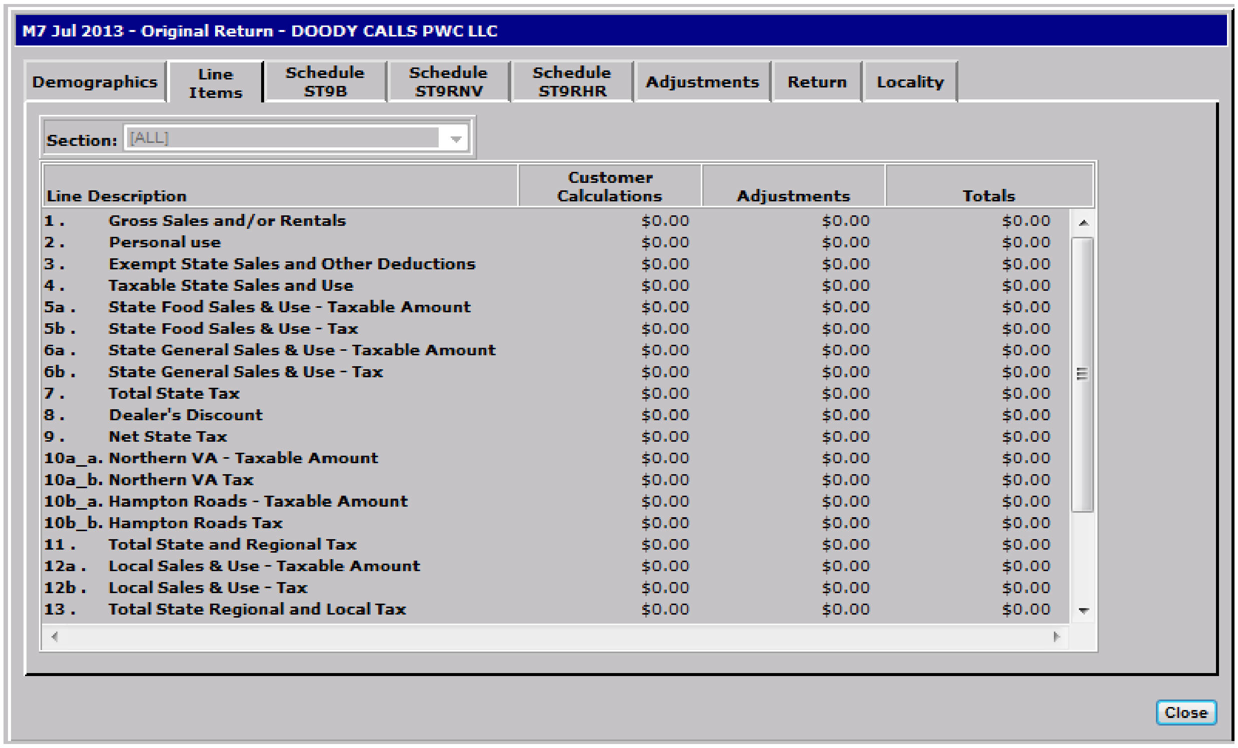
Return Details Window – Demographics Tab Fields

The table below lists the fields in the Demographics tab on the Return Details window and provides a brief description of each.

Field	Field Type	Description
FEIN or SSN	System Generated	The FEIN OR SSN on the tax return.
Tax Account Number	System Generated	The number assigned by TAX.
Entity Type	System Generated	The type of taxpayer, (i.e. Individual, Corporation, Partnership, etc.).

Return Details Window – Line Items Tab

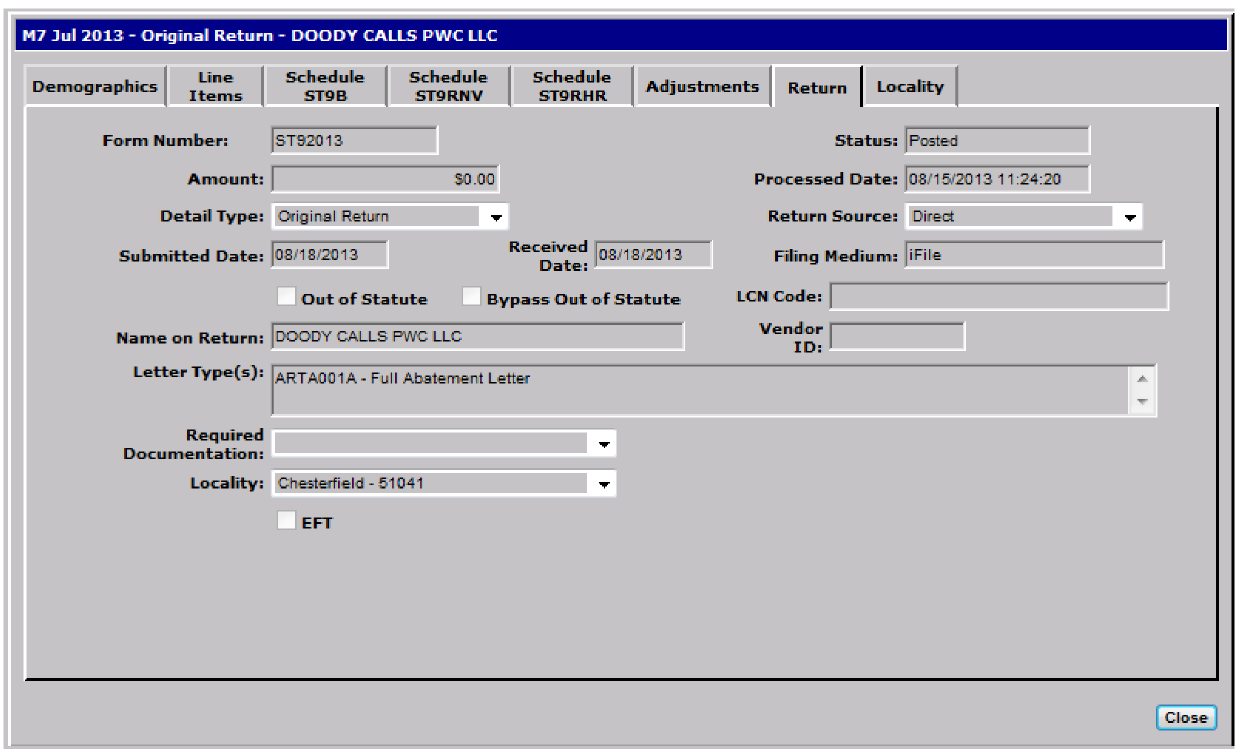
The illustration below is the Return Details window with the Line Items tab open. The fields on this tab are specific to the type of return.



Line Description		Customer Calculations	Adjustments	Totals
1 .	Gross Sales and/or Rentals	$0.00	$0.00	$0.00
2 .	Personal use	$0.00	$0.00	$0.00
3 .	Exempt State Sales and Other Deductions	$0.00	$0.00	$0.00
4 .	Taxable State Sales and Use	$0.00	$0.00	$0.00
5a .	State Food Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
5b .	State Food Sales & Use - Tax	$0.00	$0.00	$0.00
6a .	State General Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
6b .	State General Sales & Use - Tax	$0.00	$0.00	$0.00
7 .	Total State Tax	$0.00	$0.00	$0.00
8 .	Dealer's Discount	$0.00	$0.00	$0.00
9 .	Net State Tax	$0.00	$0.00	$0.00
10a_a.	Northern VA - Taxable Amount	$0.00	$0.00	$0.00
10a_b.	Northern VA Tax	$0.00	$0.00	$0.00
10b_a.	Hampton Roads - Taxable Amount	$0.00	$0.00	$0.00
10b_b.	Hampton Roads Tax	$0.00	$0.00	$0.00
11 .	Total State and Regional Tax	$0.00	$0.00	$0.00
12a .	Local Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
12b .	Local Sales & Use - Tax	$0.00	$0.00	$0.00
13 .	Total State Regional and Local Tax	$0.00	$0.00	$0.00

Return Details Window – Return Tab

The illustration below is the Return Details window with the Return tab open. The fields on this tab are specific to the type of return.



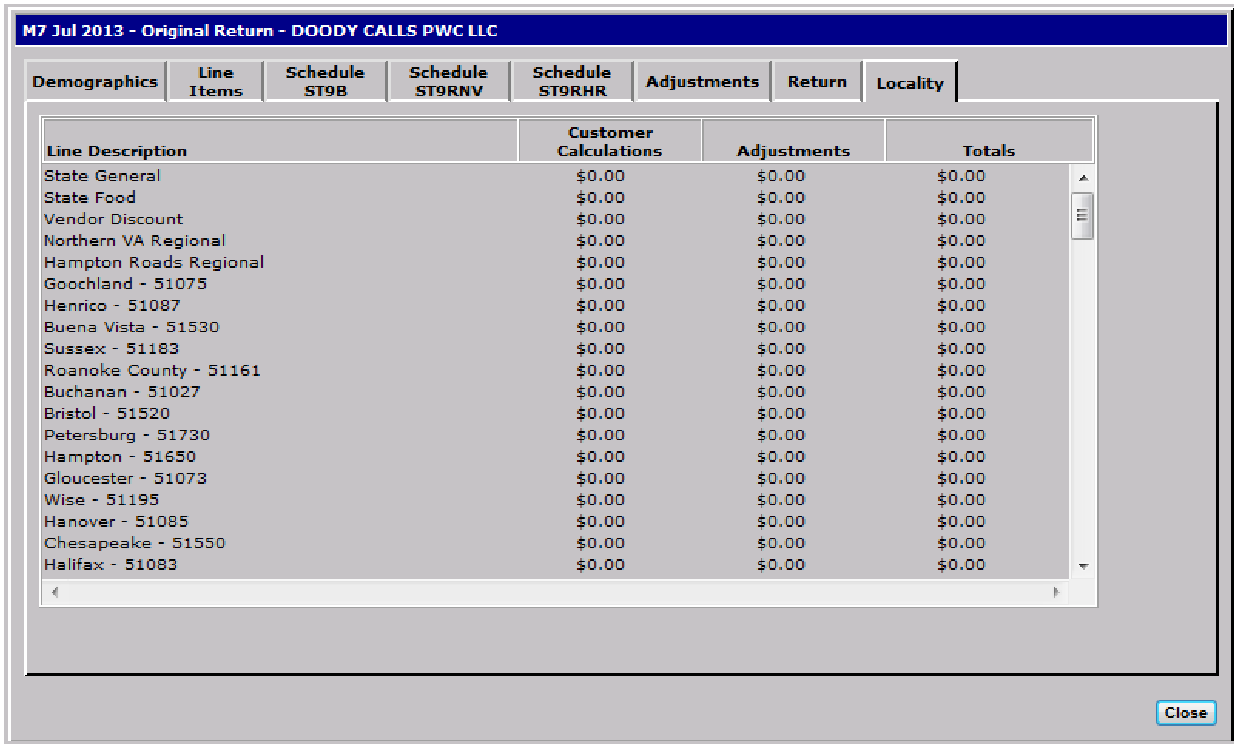
Return Details Window – Return Tab Fields

The table below lists the fields in the Return tab on the Return Details window, and provides a brief description of each.

Field	Field Type	Description
Form Number	System Generated	The Number of the Tax Return form.
Status	System Generated	Current Status of the Return (i.e. posted, pending, cancelled).
Amount	System Generated	Dollar amount of the liability on the Return.
Processed Date	System Generated	Date the return was processed.
Detail Type	System Generated	The type of return the taxpayer files (i.e. original, amended, or informational).
Return Source	System Generated	How the return reached your agency (i.e. correspondence).
Submitted Date	System Generated	Date return was submitted.
Received Date	System Generated	Date return was received.
Filing Medium	System Generated	This shows how the return was filed, (i.e., Paper, Electronically, Telefile).
Out of Statute	System Generated	When checked, indicates the return is out-of-statute. IRMS will not process a refund or overpayment for an out-of-statute return.
Bypass Out of Statute	System Generated	When checked, indicates the system will override the out-of-statue designation and process the refund or overpayment.
LCN Code	System Generated	LifeWorks Control Number - a unique code identifying the filed return in the LifeWorks system.
Name on Return	System Generated	Primary name on return.
Vendor ID	System Generated	Vendor ID Number.
Letter Type	System Generated	Letters sent to the taxpayer, if applicable.
Required Documentation	System Generated	Status of any documentation that should have accompanied the return.
Locality	System Generated	The locality for the return.
EFT	System Generated	Indicates that the return payment (if any) is to be done via EFT.

Return Details Window – Locality Tab

The illustration below is the Return Details window with the Locality tab open. The information on this tab displays the distribution between state and local tax.



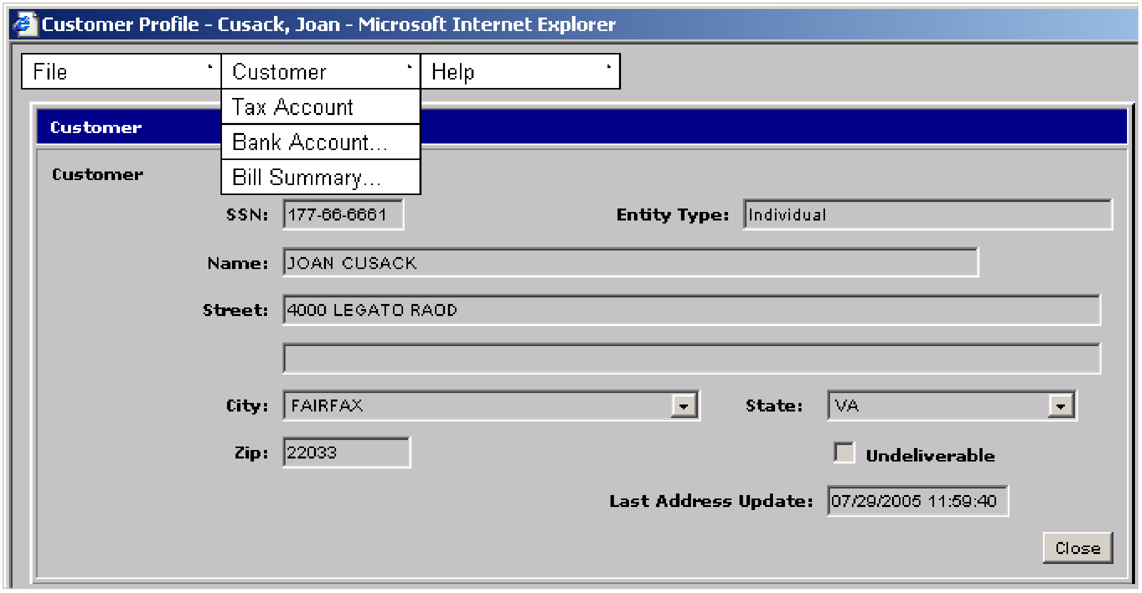
Return Details Window – Locality Tab Fields

The table below lists the fields in the Locality tab on the Return Details window and provides a brief description of each.

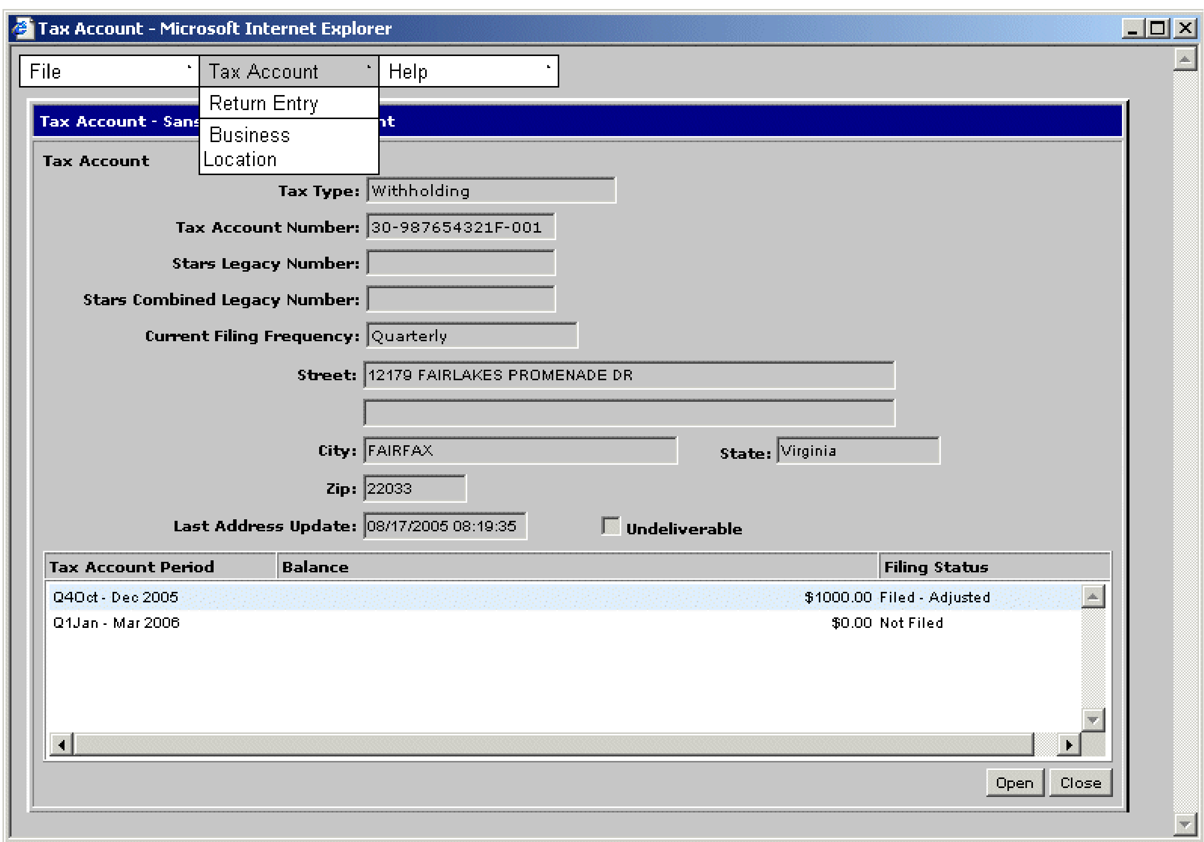
Field	Field Type	Description
Line Description	System Generated	Describes the receiver of the tax listed in the entry (i.e. State General, or the name of the locality).
Customer Calculations	System Generated	The amount from the taxpayer's original tax return that is allotted to that Line entry.
Adjustments	System Generated	The amount of any adjustment made to the amount listed in the Customer Calculations column.
Totals	System Generated	The total amount allotted to the receiver named in the entry plus/minus any adjustments.

View Return Details

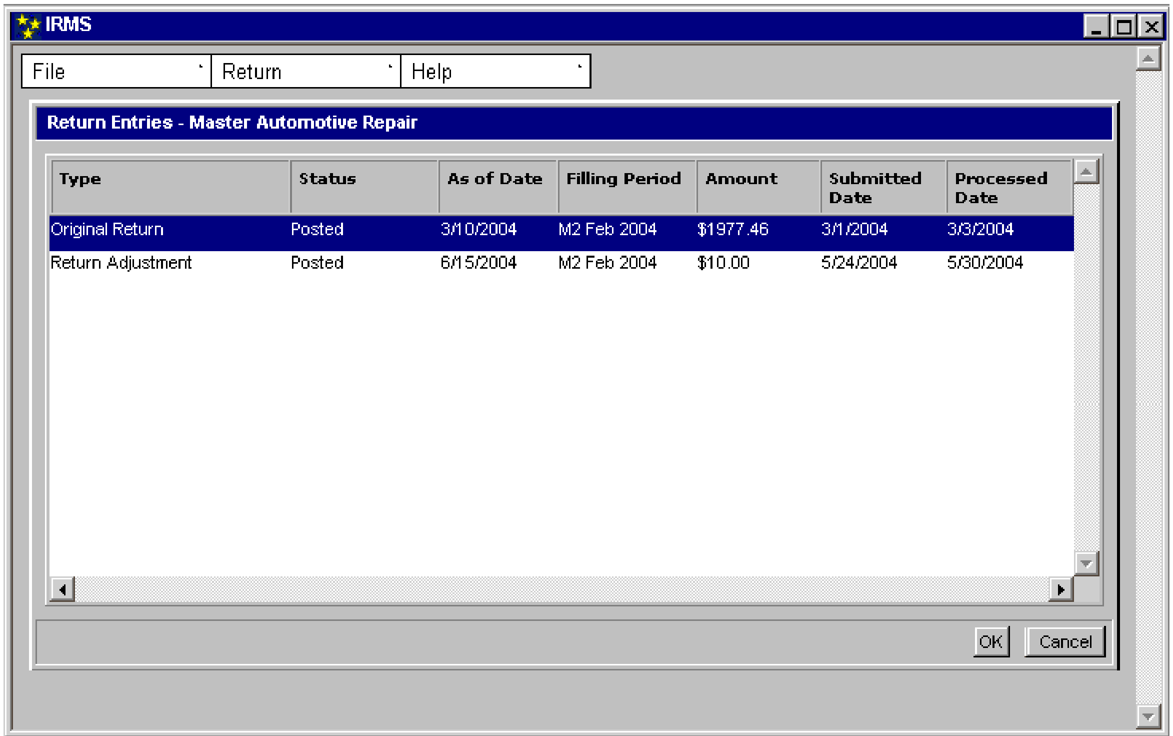
Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).



Step 2: From the Customer Profile window, select **<u>Customer: Tax Account</u>**.
The Tax Account window opens.

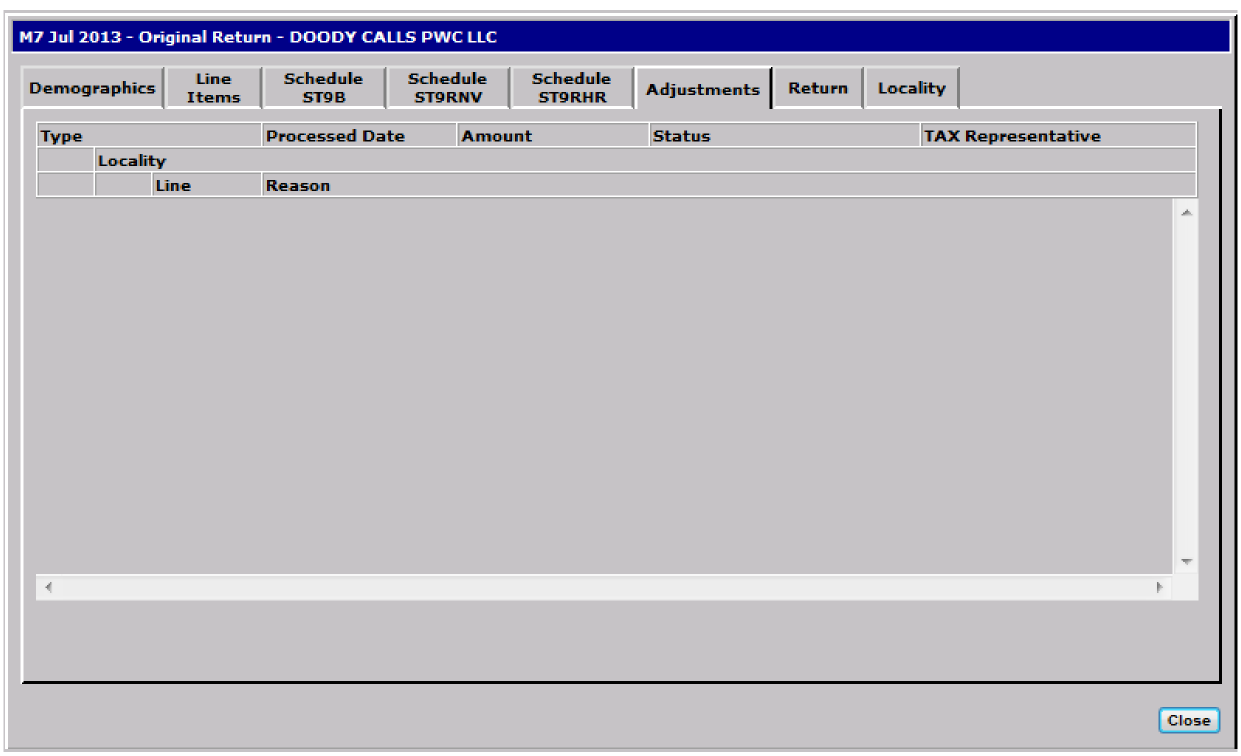


Step 3: Select **<u>Tax Account: Return Entry</u>**.
The Return Entries window displays.

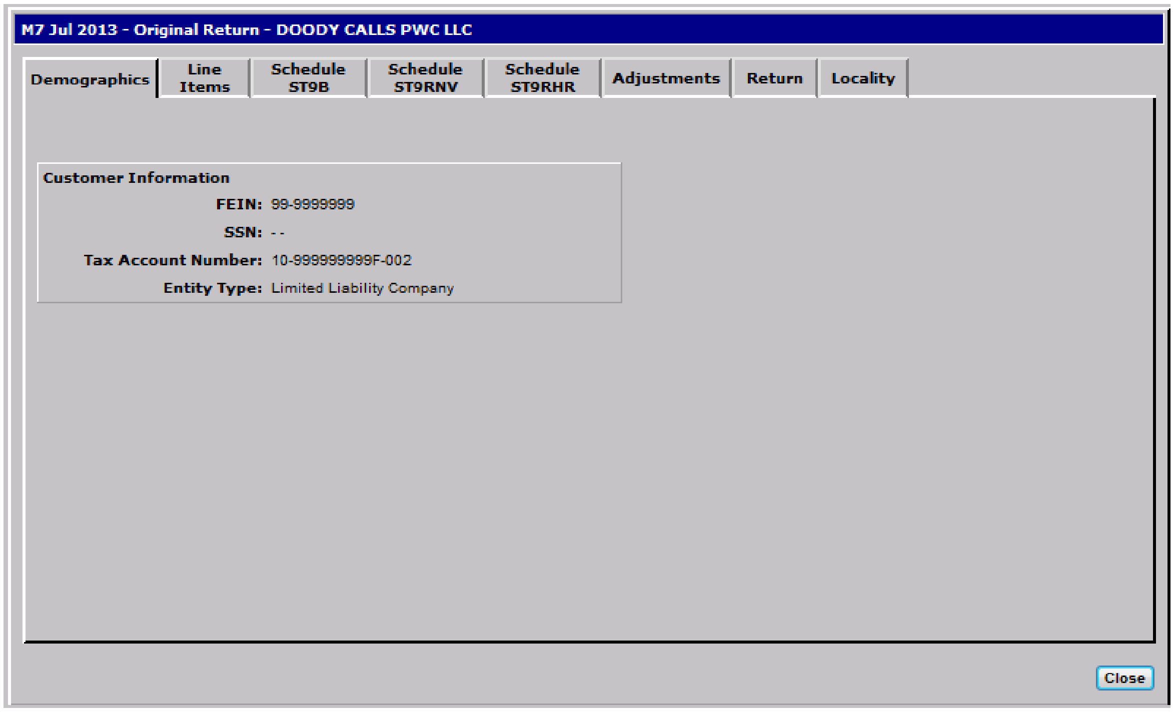


Step 4: **Double-click** on the return you want to open.
The Return Details – Adjustments tab opens.

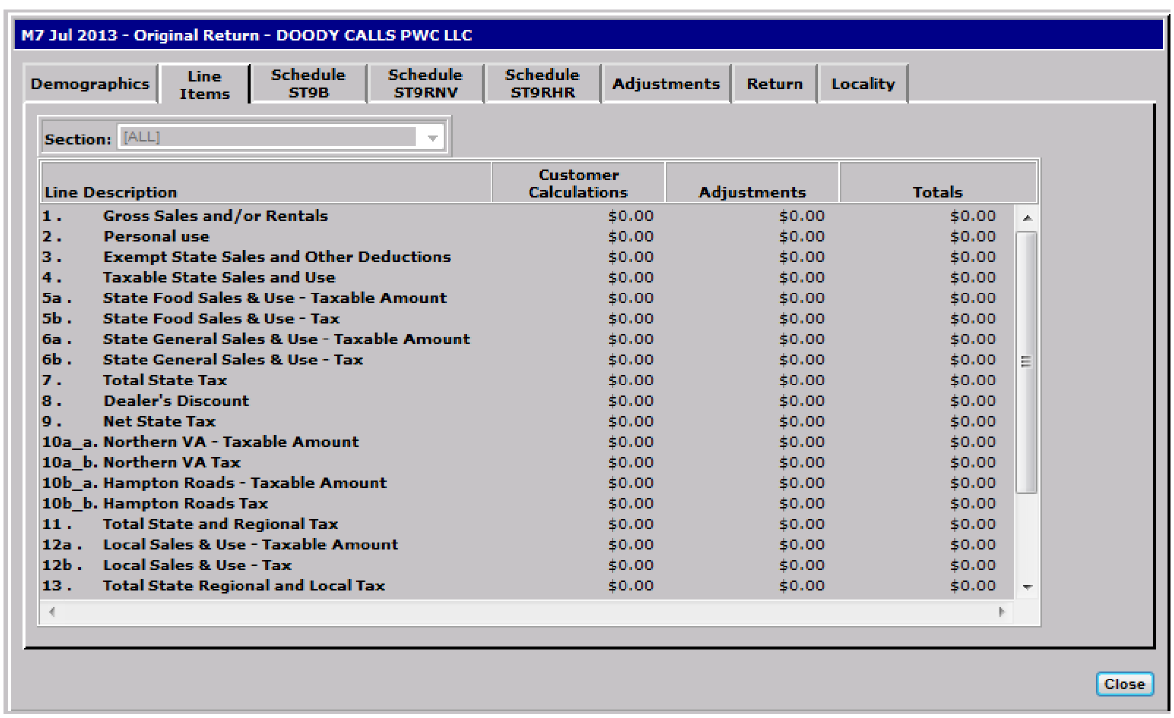
***Note**:* The system defaults to the Adjustments tab displaying any adjustments to the original return.



Step 5: Click on the **Demographics** tab.
The information on the Demographics tab now displays.



Step 6: Click **Line Items** to open the Line Items Tab.
The Line Items tab displays each line item entry from the taxpayer's return. This view will vary depending on the tax form and filing year, so a description of the fields is not included. Using the down arrow on the scroll bar, you can scroll down the list to see all entries or you can use the Section dropdown list to go to a specific section of the return.



Line Description		Customer Calculations	Adjustments	Totals
1 .	Gross Sales and/or Rentals	$0.00	$0.00	$0.00
2 .	Personal use	$0.00	$0.00	$0.00
3 .	Exempt State Sales and Other Deductions	$0.00	$0.00	$0.00
4 .	Taxable State Sales and Use	$0.00	$0.00	$0.00
5a .	State Food Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
5b .	State Food Sales & Use - Tax	$0.00	$0.00	$0.00
6a .	State General Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
6b .	State General Sales & Use - Tax	$0.00	$0.00	$0.00
7 .	Total State Tax	$0.00	$0.00	$0.00
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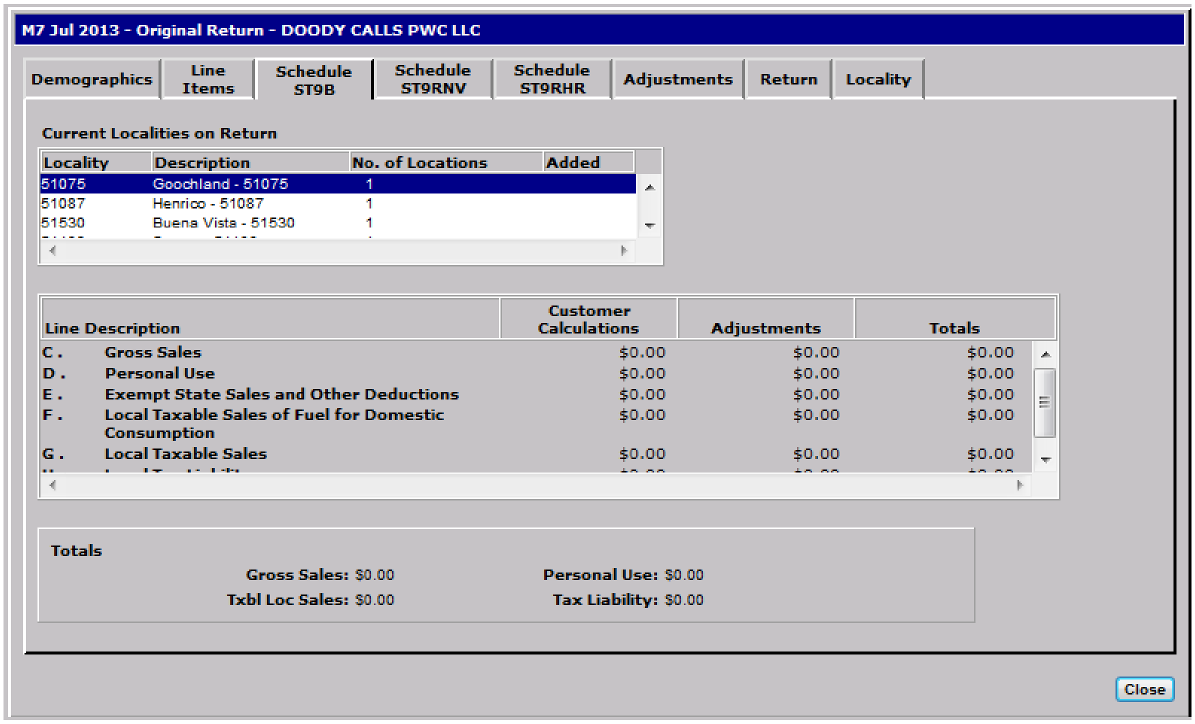
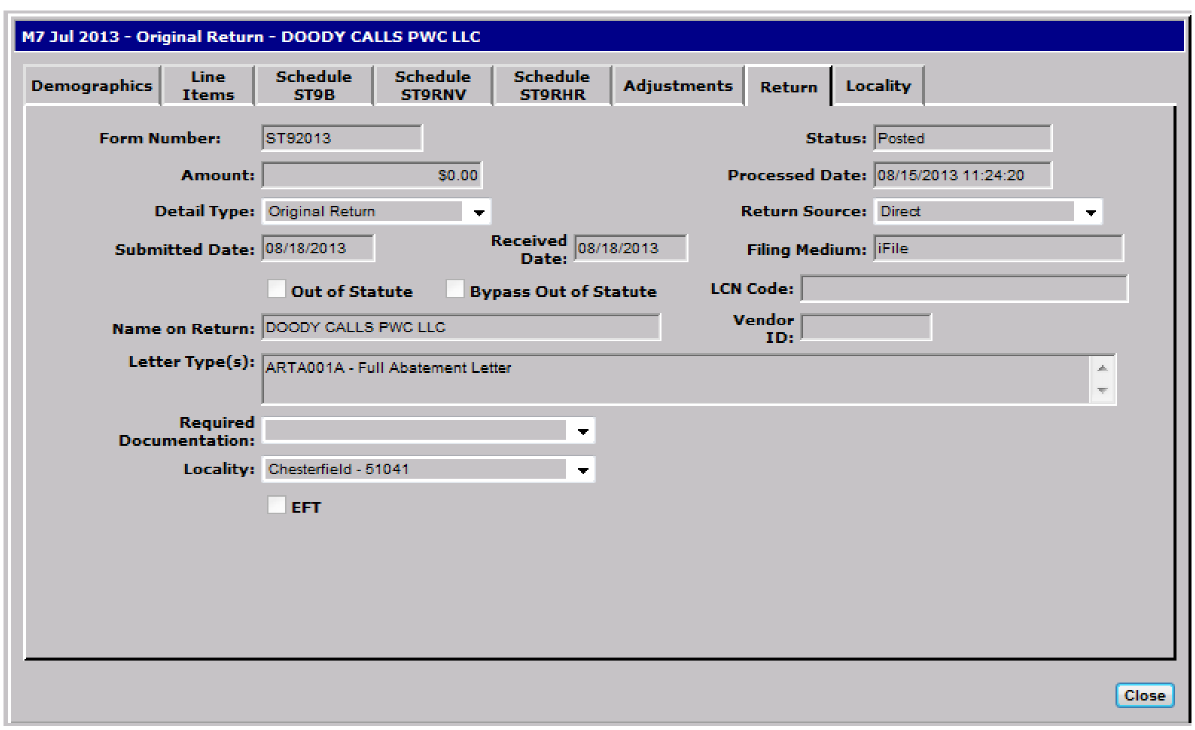
10a_a.	Northern VA - Taxable Amount	$0.00	$0.00	$0.00
10a_b.	Northern VA Tax	$0.00	$0.00	$0.00
10b_a.	Hampton Roads - Taxable Amount	$0.00	$0.00	$0.00
10b_b.	Hampton Roads Tax	$0.00	$0.00	$0.00
11 .	Total State and Regional Tax	$0.00	$0.00	$0.00
12a .	Local Sales & Use - Taxable Amount	$0.00	$0.00	$0.00
12b .	Local Sales & Use - Tax	$0.00	$0.00	$0.00
13 .	Total State Regional and Local Tax	$0.00	$0.00	$0.00

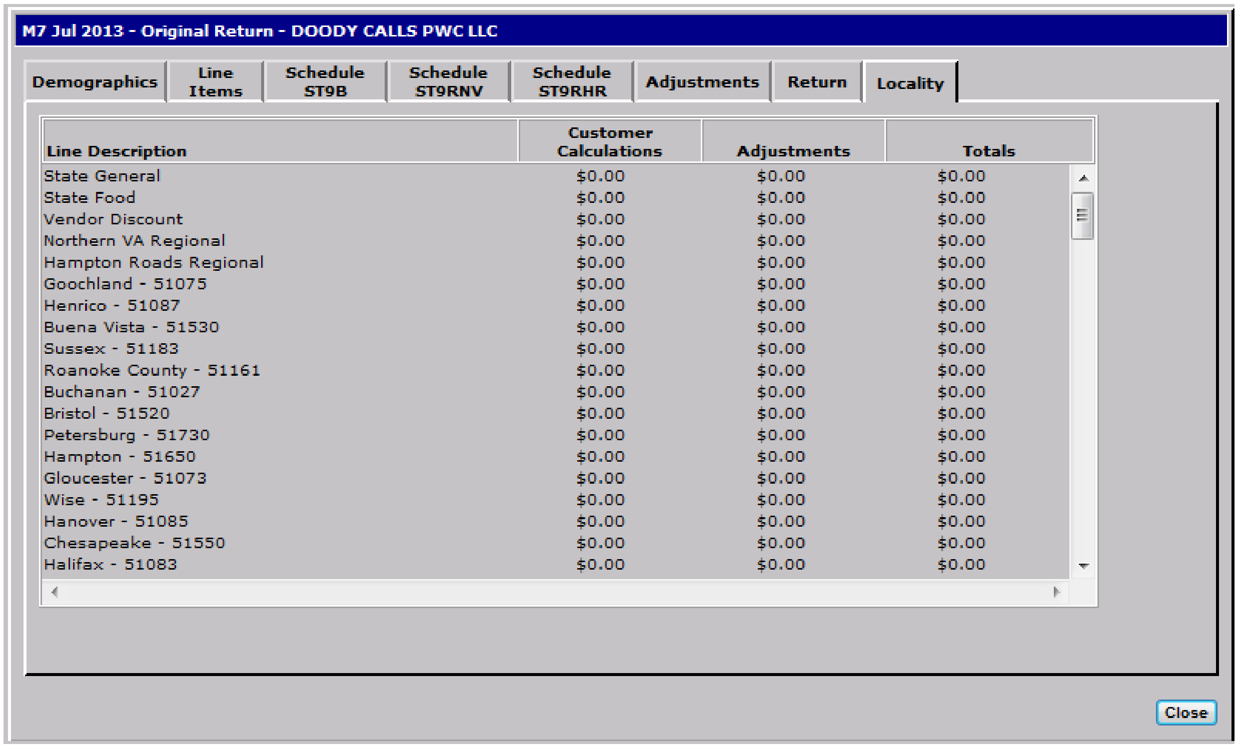
Step 7: Click on the desired **Schedule** tab.
The Return Details window always includes tabs for all of the schedules that apply to the tax type, whether or not the taxpayer filed the schedule. In this example, a ST9B Schedule displays.



Step 8: Click **Return** to open the Return tab.
This tab contains a synopsis of the return with all of the activities pertaining to it.



Step 9: Click **Locality** to open the Locality tab.
This tab displays the distribution of state and local tax.



Line Description	Customer Calculations	Adjustments	Totals
State General	$0.00	$0.00	$0.00
State Food	$0.00	$0.00	$0.00
Vendor Discount	$0.00	$0.00	$0.00
Northern VA Regional	$0.00	$0.00	$0.00
Hampton Roads Regional	$0.00	$0.00	$0.00
Goochland - 51075	$0.00	$0.00	$0.00
Henrico - 51087	$0.00	$0.00	$0.00
Buena Vista - 51530	$0.00	$0.00	$0.00
Sussex - 51183	$0.00	$0.00	$0.00
Roanoke County - 51161	$0.00	$0.00	$0.00
Buchanan - 51027	$0.00	$0.00	$0.00
Bristol - 51520	$0.00	$0.00	$0.00
Petersburg - 51730	$0.00	$0.00	$0.00
Hampton - 51650	$0.00	$0.00	$0.00
Gloucester - 51073	$0.00	$0.00	$0.00
Wise - 51195	$0.00	$0.00	$0.00
Hanover - 51085	$0.00	$0.00	$0.00
Chesapeake - 51550	$0.00	$0.00	$0.00
Halifax - 51083	$0.00	$0.00	$0.00

Step 10: From the File menu, select **Close** to exit the Return Details window and return to the Return Entries window.